v3.0

OhioBuys

Connecting Buyers and Suppliers

Viewing and Responding to Solicitations

Published: May 2023

Audience: Bidders and/or Suppliers who would like to respond to a State of Ohio solicitation.

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If you have questions or need additional assistance, please contact Ohio Shared Services Contact Center via email (OBM.SharedServices@OBM.ohio.gov) or phone (877-644-6771).

In This Document:

Overview: Viewing and responding to solicitations at the State of Ohio can be broken down into four main tasks:

1. **View a Solicitation:** There are two ways for Bidders and Suppliers to view solicitations:
    1. **Bidder/Supplier Invitation:** When the State of Ohio sends out a solicitation to specific Bidders and/or Suppliers for bidding, they will receive a notification via email inviting them to respond within OhioBuys.
    2. **Public Solicitations Page:** Bidders and Suppliers can navigate to the Public Solicitations Page to view all active public solicitations. In order to participate and submit a response, Bidders and Suppliers must log in to OhioBuys.
2. **Send Inquiries:** OhioBuys allows Bidders and Suppliers to submit inquires and correspondence to the State. Bidders and Suppliers should submit all clarifications, Q&A, and negotiations using OhioBuys.
3. **Submit a Response:** Once a Bidder or Supplier has reviewed a solicitation and accepted the associated Terms & Conditions, they will have the ability to provide responses to the questions within the Questionnaire and Item tabs and submit their response. Upon submitting a response, the user who submitted the response will see a confirmation message stating that the bid has been submitted with the associated time stamp. The Bidder or Supplier will also be able to view their response history at any time.
4. **Amend and/or Withdraw a Response:** If the State issues an amendment (i.e., a new round), Bidders and Suppliers will be required to acknowledge receipt of the amendment and re-submit a response to remain under solicitation consideration. In addition, Bidder or Suppliers also can withdraw a response and remove it from being considered for award.

Key Terms

Solicitation Types in OhioBuys:

- **Simple Solicitation** : Solicitations that allow State agencies to create and distribute Requests for Information (RFI) and Requests for Quotes (RFQs).
- **Single Envelope**: Solicitations in which Bidders and/or Suppliers are instructed to submit all aspects of a response in a single envelope.
- **Double Envelope**: Solicitations in which Bidders and/or Suppliers are instructed to submit both technical and financial responses in two separate and sealed envelopes.
- **Triple Envelope**: Solicitations in which Bidders and/or Suppliers are instructed to submit technical, financial, and mandatory responses in three separate and sealed envelopes.
- **Quick Quote**: A quick quote is a simplified short-term solicitation process.
- **Public Notice**: Notifies the public of a solicitation that will be evaluated and awarded outside of OhioBuys.

Key Terms:

1) **Sourcing Project:** Any kind of sourcing event in OhioBuys. This includes all types of solicitations, as well as Quick Quotes. Sourcing projects can have multiple lots and/or rounds.
2) **Lots**: A new lot is typically issued for Bidder and/or Supplier clarifications. Lots can be used to clarify information or separate the different needs for a specific solicitation. For example, a procurement user may wish to separate a solicitation for a conference into different lots. One lot could be created for food, while another could be created for IT equipment.
3) **Rounds**: A new round is typically issued whenever there is amendment to the original solicitation or when you want to issue a second round of bidding for a shortlisted group of Bidders and/or Suppliers.
4) **RFx:** A solicitation in OhioBuys that is composed of lots and rounds. An RFx is always associated to a Sourcing Project; a Sourcing Project may have multiple RFx's associated to it.

VIEWING A SOLICITATION

Overview

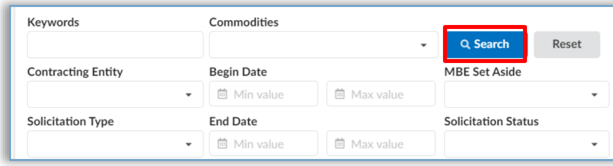
- What's Covered: Navigating to the Public Solicitations page to review open solicitations.
- Roles: Bidders and/or Suppliers
- Used When: A Bidder or Supplier would like to review a solicitation in OhioBuys.

How to View a Solicitation

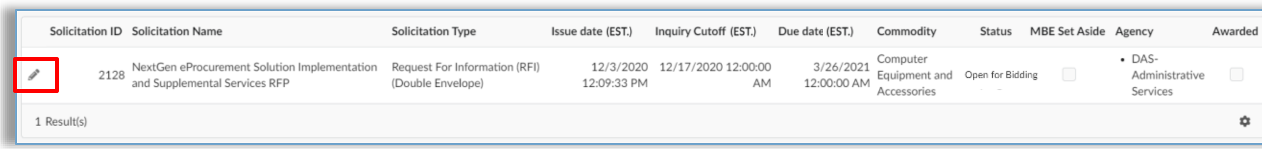
Step-by-Step Instructions for Viewing a Solicitation

1 Navigate to the OhioBuys Public Solicitation page: https://ohiobuys.ohio.gov/

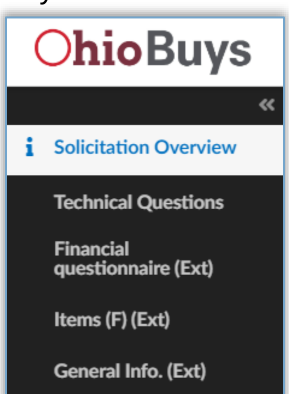
2 On this page, you can search by Keywords, Commodities, Solicitation Status, Contracting Entity, Solicitation Dates, MBE Set Aside status, Solicitation Type, Solicitation ID, and Awarded status. Enter your search terms in the appropriate field and click the **Search** button.



3 Search results are displayed below. Once you have found the solicitation you would like to review, click the **Pencil (** **)** icon next to the solicitation name.

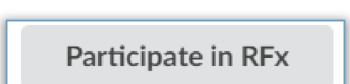


4 Review the details of the solicitation. Depending on the type of solicitation, solicitation details may be shown across a variety of tabs to the left side of the page. Click the « to expand:



1. **Solicitation Overview:** provides general information regarding the solicitation such as the name, dates, type, status, and summary. All solicitation documents are also available on this tab.
2. **Technical Questionnaire:** lists any technical questions that are being to Bidders and/or Suppliers as part of this solicitation.
3. **Financial Questionnaire:** lists any financial questions that are being to Bidders and/or Suppliers as part of this solicitation.
4. **Items:** lists the goods and/or services that are being requested as part of this solicitation.
5. **General Questionnaire:** lists any general questions that are being to Bidders and/or Suppliers as part of this solicitation.

5 If you would like to respond to this solicitation and/or submit clarifying questions. Click the **Participate in RFx** button at the top of the page and log in with your Ohio|ID and password. If you are a new Bidder, you are also able to register by clicking this button. For additional details regarding accessing OhioBuys, please refer to the Bidder and Supplier Learning Guide.



SENDING INQUIRIES

Overview

- What's Covered: Using OhioBuys to send inquiries to the State regarding a solicitation as well as how to review to the inquiry history for a solicitation
- Roles: Bidders and/or Suppliers
- Used When: A Bidder or Supplier would like to submit a clarifying question to the State regarding a solicitation

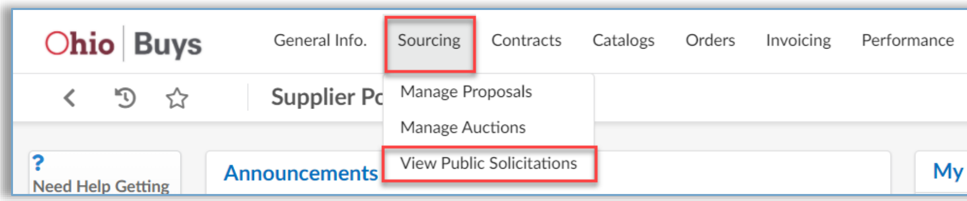
OhioBuys

How to Send Inquiries

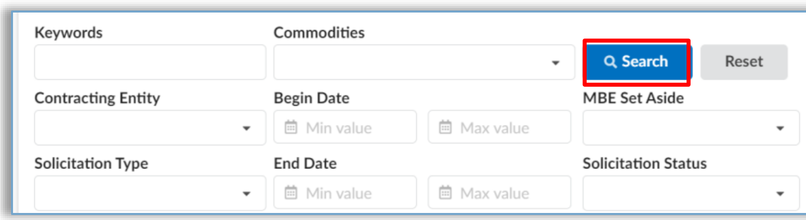
Step-by-Step Instructions for Sending Inquiries for a Solicitation

⚠ Solicitations in OhioBuys allow for potential Bidders and/or Supplier to submit inquiries. Users can search for the solicitation on the View Public Solicitations page and look at the Inquiry Cutoff column in the search results to view the date and time until which inquiries will be accepted for a solicitation.

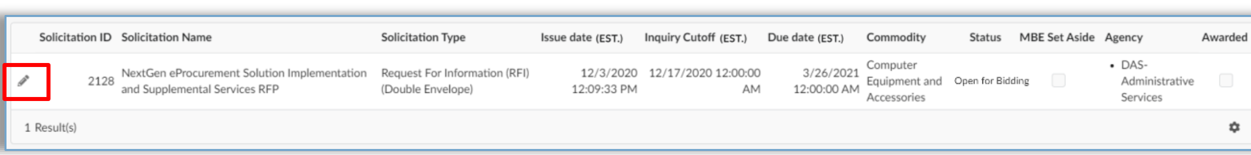
1 Log in to OhioBuys. From the Main Menu Navigation Bar, click **Sourcing** and then select **View Public Solicitations** from the drop-down menu.



2 On this page, you can search by Keywords, Commodities, Solicitation Status, Contracting Entity, Solicitation Dates, MBE Set Aside status, Solicitation Type, Solicitation ID, and Awarded status. Enter your search terms in the appropriate field and click the **Search** button.



3 Search results are displayed below. Once you have found the solicitation you would like to review, click the **Pencil (** ✎ **)** icon next to the solicitation name.



⚠ Please note, if you were invited to participate in solicitation, you can view the details of that solicitation by clicking on the hyperlink listed in the email you received. In addition, the Manage Proposals page will display any solicitations that you have been invited to respond to.

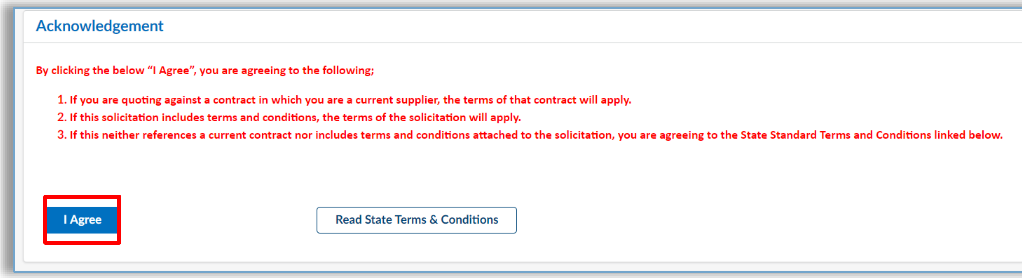
4 If you haven't previously viewed this solicitation, review the details across the various tabs and then click **Participate in RFx.**

OhioBuys

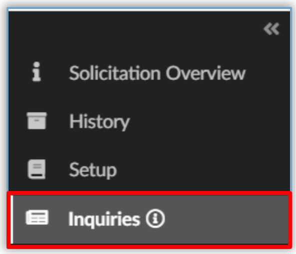
How to Send Inquiries

Step-by-Step Instructions for Sending Inquiries for a Solicitation

5 Review the Acknowledgement window and then click **I Agree.**

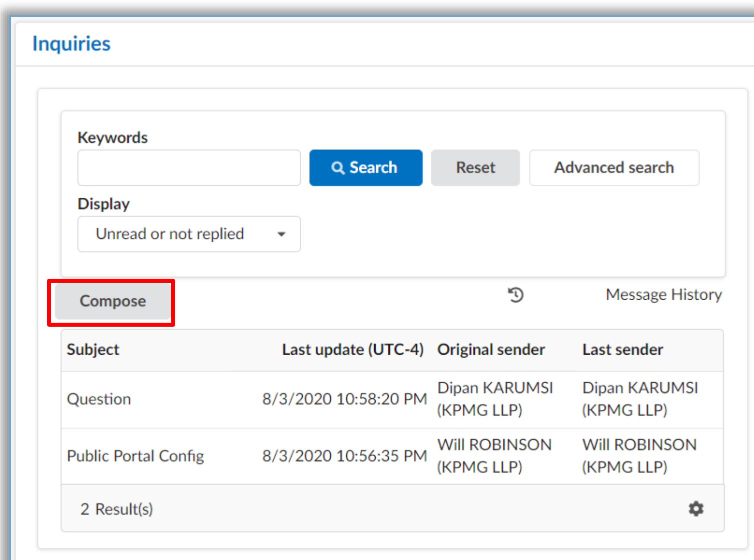


6 Navigate to the **Inquiries** tab.



7 The complete inquiry history for the solicitation is displayed. All questions and responses for a solicitation are posted publicly and will not be reported individually. To compose a new inquiry, click **Compose.**

⚠ To search for an existing inquiry, scroll through the message history or enter a keyword into the **Search** field, then click **Search**. Click on the desired line item within the message history to view its details.



Send Inquiries

Step-by-Step Instructions for Sending Inquiries for a Solicitation

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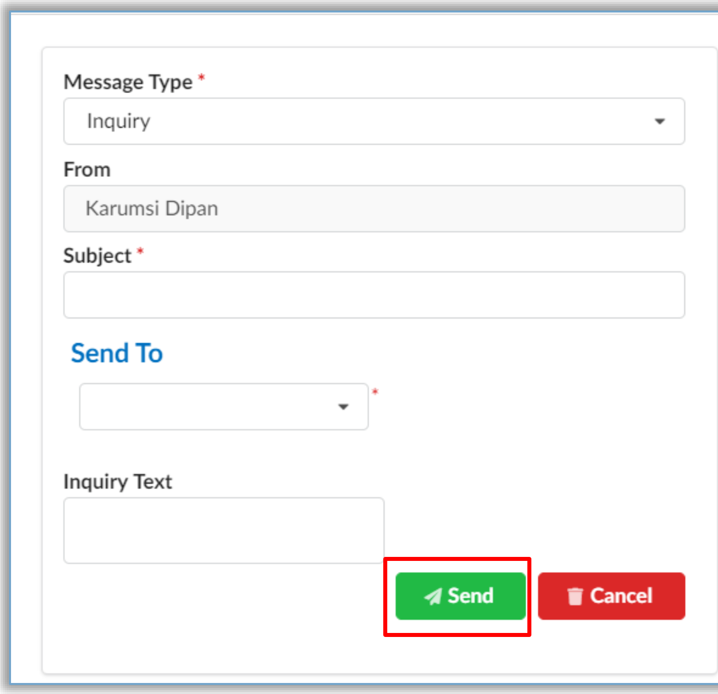
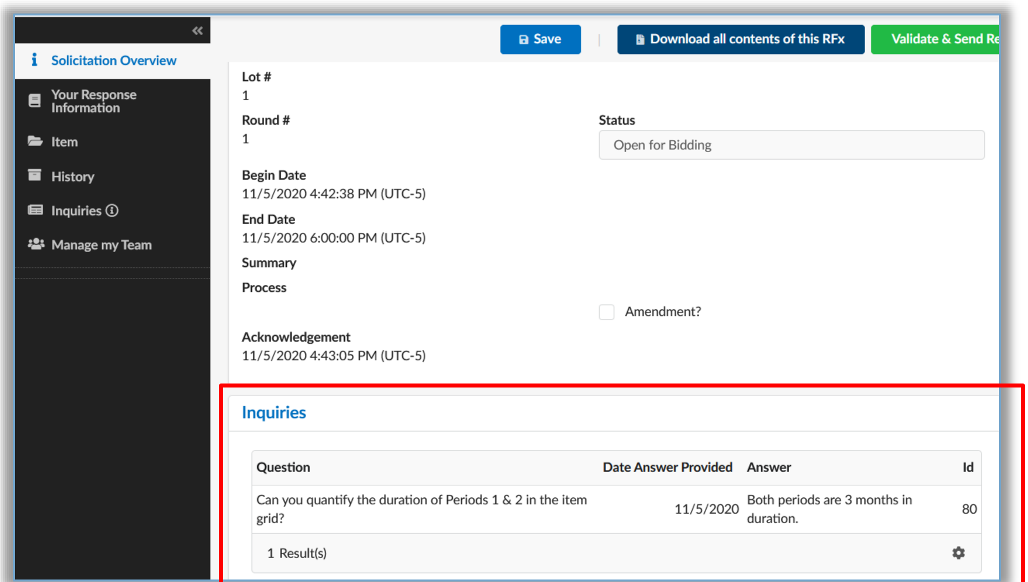
Complete all of the required fields. The fields marked by a red asterisk (*) are required. In the **Send To** field select "Sourcing Responsible". Failing to do this may cause issues with sending your inquiry. Once you are done, click **Send** to send the inquiry to the State.



⚠ All responses will be posted publicly meaning all Bidders will see the question and answer. It is up to the Supplier that posed the question to proactively review the solicitation details in order to check for answers during the Q&A period. All answers will be visible on the **Solicitation Overview** tab within the given solicitation.



SUBMITTING A RESPONSE

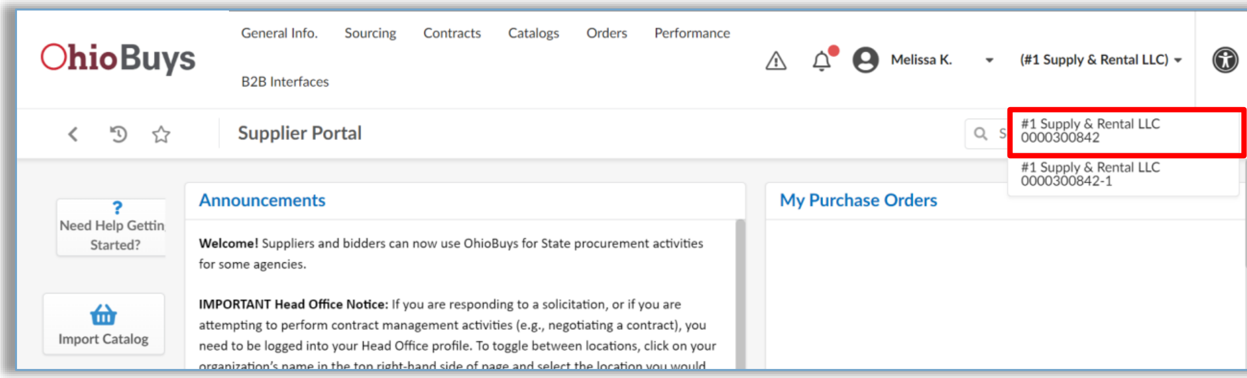
Overview

- What's Covered: Responding to questionnaire(s) and item grids in OhioBuys, uploading supporting documents, and formally submitting a response to a solicitation
- Roles: Bidders and/or Suppliers
- Used When: A Bidder or Supplier would like submit their response to a solicitation

Step-by-Step Instructions for Submitting a Response to a Solicitation

If you are responding to a solicitation, or if you are attempting to perform contract management activities (e.g., negotiating a contract), you need to be logged in to your head office location.

To toggle between your company's locations, click on your organization's name in the top right hand side of any page in OhioBuys and select the location you would like to view. You can confirm you are looking at your head office location, by hovering the location drop-down option and reviewing the OAKS ID. If there is not a -1, -2, -3, etc., after the listed ID, you are viewing the head office location. The locations associated with your organization are managed within the Supplier Portal: https://supplier.ohio.gov.



Please note, contacts and orders are managed at the location level, not the Supplier level, so it is recommended you routinely verify activity in all of the locations to which you have access. For additional details on how to manage your contacts, please refer to the Bidder and Supplier Learner Guide.

When working in OhioBuys, please ensure you have only one window of OhioBuys open at a time. Multiple windows can create errors such as a time-out or data not saved errors. If a user is logged out of one browser/window/tab, they will be logged out of all OhioBuys sessions. When this occurs, the user must close all open windows/tabs in all browsers. Next, they should clear their cache/history (also noted as clear browsing data) and open a single browser window for OhioBuys. These steps should prevent the error from occurring during their session.

If you are attempting to respond to/submit a proposal but the proposal is not being submitted, the above steps should be followed to resolve the issue.

Users will also be logged out after 30 minutes of inactivity. To avoid losing any work (e.g., progress on responding to a solicitation), users should save their work frequently.

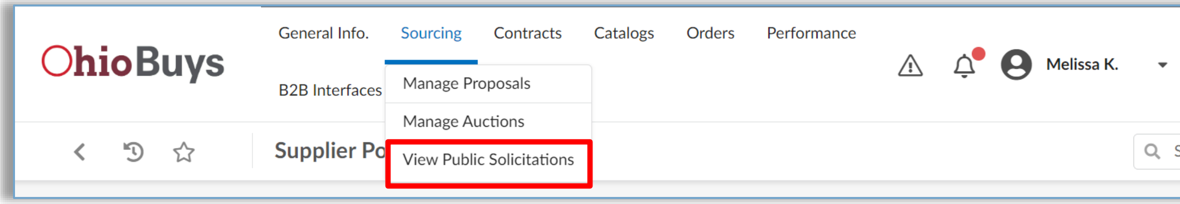
OhioBuys

How to Submit a Response

Step-by-Step Instructions for Submitting a Response to a Solicitation

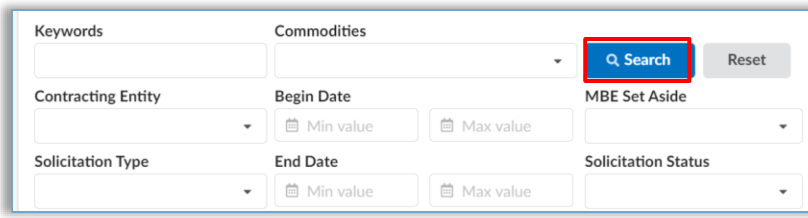
1

Log in to OhioBuys. From the Main Menu Navigation Bar, click **Sourcing** and then select **View Public Solicitations** from the drop-down menu.



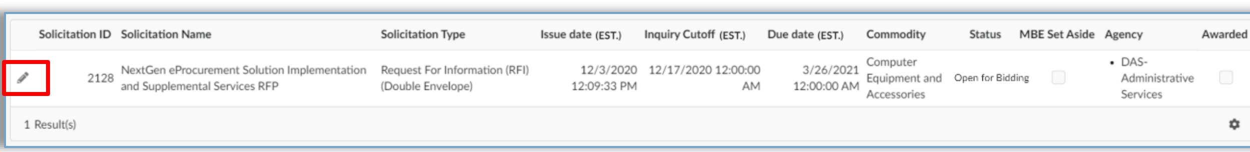
2

On this page, you can search by Keywords, Commodities, Solicitation Status, Contracting Entity, Solicitation Dates, MBE Set Aside status, Solicitation Type, Solicitation ID, and Awarded status. Enter your search terms in the appropriate field and click the **Search** button.



3

Search results are displayed below. Once you have found the solicitation you would like to review, click the **Pencil ( )** icon next to the solicitation name.

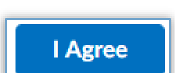


⚠ If you were invited to participate in solicitation, you can view the details of that solicitation by clicking on the hyperlink listed in the email you received. In addition, the Manage Proposals page will display any solicitations that you have been invited to respond to.

4

If you haven't previously viewed this solicitation, review the details across the various tabs and then click **Participate in RFx.**

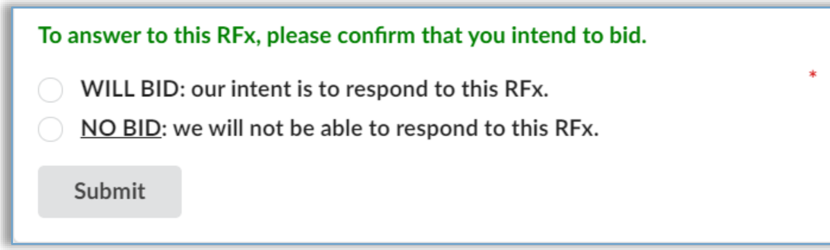
From the resulting page, review the Acknowledgement window and then click **I Agree.**



Step-by-Step Instructions for Submitting a Response to a Solicitation

5

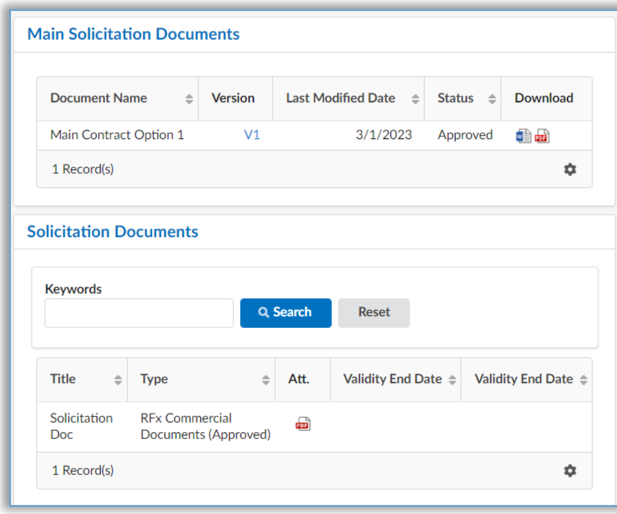
Indicate that your organization **WILL BID** and then click **Submit.**



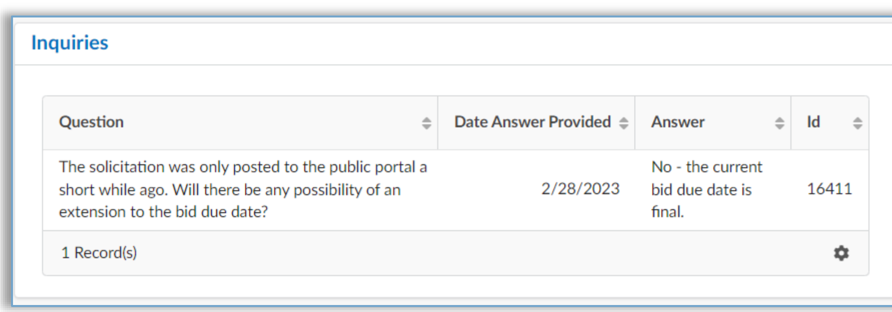
6

The **Solicitation Overview** tab is displayed. In the **Solicitation General Information** section, users can see high-level information about the solicitation, including the current lot and round numbers, and the solicitation begin and end dates.

- If the State has provided documents associated with a solicitation, those will appear on the Solicitation Overview tab.
- Some solicitations will have a **Main Solicitation Documents** section. The State will sometimes include a draft version of the contract associated with a solicitation. Users should download these documents using MS Word by clicking the **MS Word** ( ) icon.



- The draft contract will have Track Changes enabled. If the solicitation terms and conditions permit, users can redline the document and add comments using Word, then upload the draft contract in the **Supplier Financial Documents** section of the **Setup** tab. For more details on uploading solicitation documents, please refer to the appropriate section of this learner guide.
- All other documents provided by the State will appear in the **Solicitation Documents** section.



- If the solicitation includes an Inquiry period, responses to inquiries will appear at the bottom of the Solicitation Overview tab.

Step-by-Step Instructions for Submitting a Response to a Solicitation

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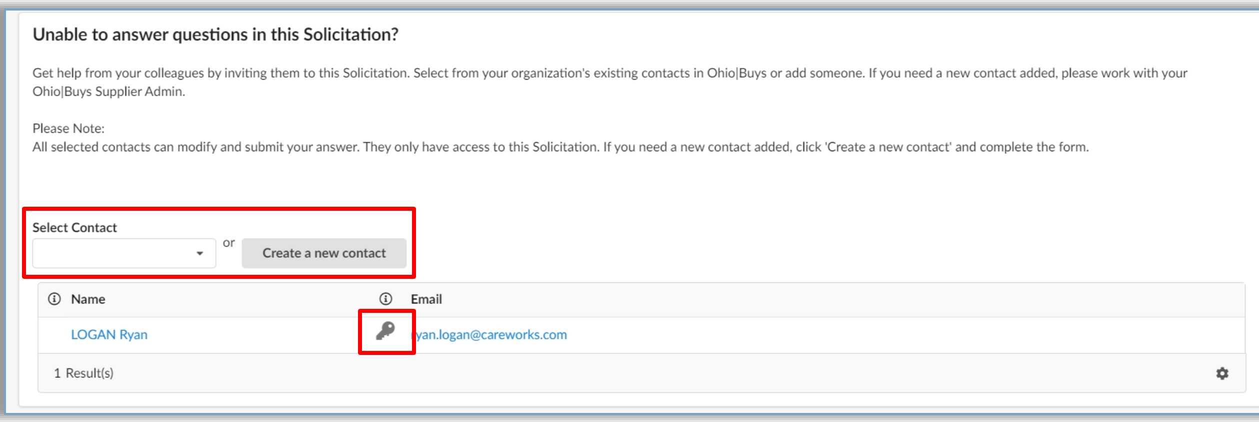
To submit a response, you must complete all of the required fields indicated by a red asterisk (*) on the Setup tab as provide responses on the Item, and General/Technical/Financial Questionnaire tabs as applicable. As you enter information for your response, be sure to click the **Save** button at the top of the page to save your work.

⚠ For Public Notice Solicitations you will not submit your response in OhioBuys. Review the solicitation details and follow the listed instructions on how to submit your response offline.

8

Manage my Team: If you would like to collaborate with other members of your organization to respond to a solicitation, you can add them as team members on the Manage My Team tab.



1. To add an existing contact, select the contact from the **Select Contact** drop-down menu and click **Save.**

2. To add a new contact, click **Create a new contact**, populate the required fields, and click **Save & Close.** To invite the new contact to log in to OhioBuys and create an OH|ID, click the **Key ( )** icon next to their name.

Step-by-Step Instructions for Submitting a Response to a Solicitation

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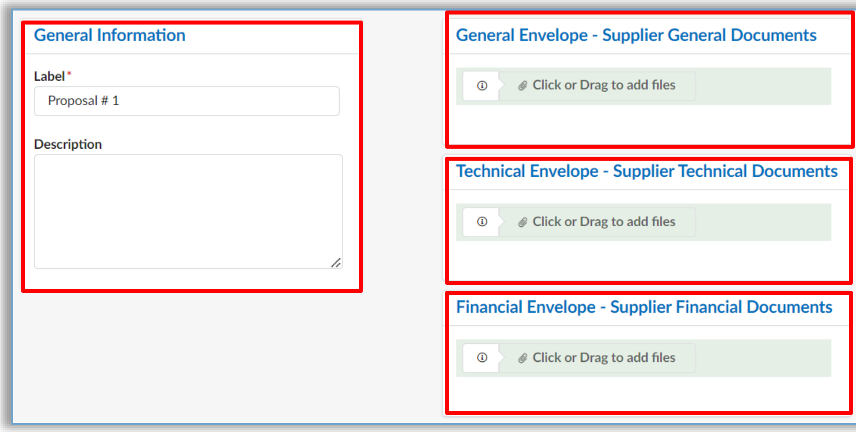
Setup tab**:**



a) Enter the response name in the **Label** field**.** If applicable, select the appropriate **Response Type** (e.g., Main Response or Alternate Response) and enter a corresponding **Description** for your response.

b) As you complete your response, upload supporting documents in the **General Envelope - Supplier General Documents**, **Technical Envelope - Supplier Technical Documents** and **Financial Envelope - Supplier Financial Documents** sections of this tab. If your response contains confidential information and/or you would like to upload a redacted version of your response, upload your redacted response here, in addition to your un-redacted version.

c) Once you are done with populating this tab or you would like to proceed with completing another tab, click **Save.**

⚠ Depending on how the solicitation was set up, the Setup tab may look similar to the Financial/Technical Questionnaire tabs and contain a list of requirements and questions that need to be responded to. Please refer to the corresponding section of this guide for details on how to respond to requirements and questionnaires.

OhioBuys

How to Submit a Response

Step-by-Step Instructions for Submitting a Response to a Solicitation

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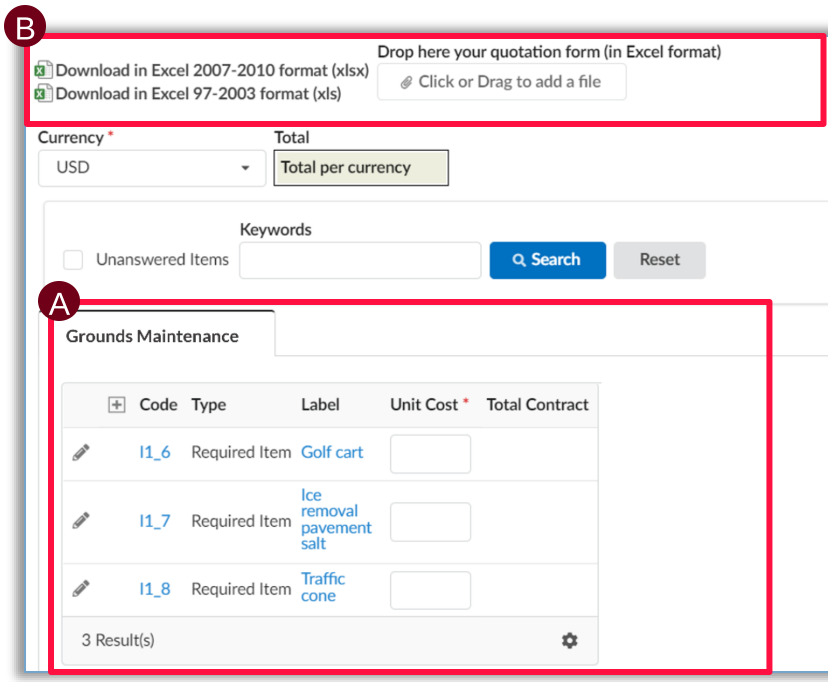
Item tab: The items associated with the solicitation are displayed in a grid. To submit a response:

⚠ If an item grid is present, responses must be provided per line item. Proposal document uploads will not be accepted as a response to solicitations with an item grid.



a) Enter responses for each of the listed fields. The fields displayed will vary depending on the solicitation. Mandatory fields will be marked with a red asterisk (*).

1. Add **Comments** and **Attachments** for each line item as necessary. The **Comments** field is where you should indicate the State contract number your quote is referencing (as applicable).

2. Note that depending on your screen resolution you may need to scroll to the right to see these fields. Review Manufacturer and SKU Number fields where available.

b) If desired, you can also download the displayed item grid into an Excel spreadsheet, fill in your responses in Excel, save the file, and upload the completed grid to OhioBuys.

1. Click **Download in Excel 2007-2010 format (xlsx).**

2. Open the corresponding Excel spreadsheet that was downloaded to your computer and follow the instructions contained in the spreadsheet.

3. After you have completed the spreadsheet, save the file and then upload it into OhioBuys by clicking on the **Click or Drag to add a file** button on the corresponding tab you are trying to populate.

c) Once you are done with populating this tab or you would like to proceed with completing another tab, click **Save.**

OhioBuys

How to Submit a Response

Step-by-Step Instructions for Submitting a Response to a Solicitation

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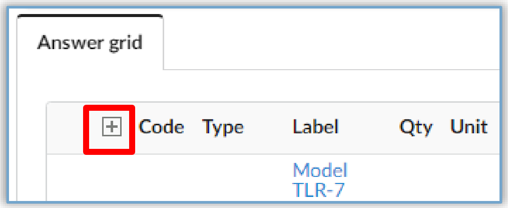
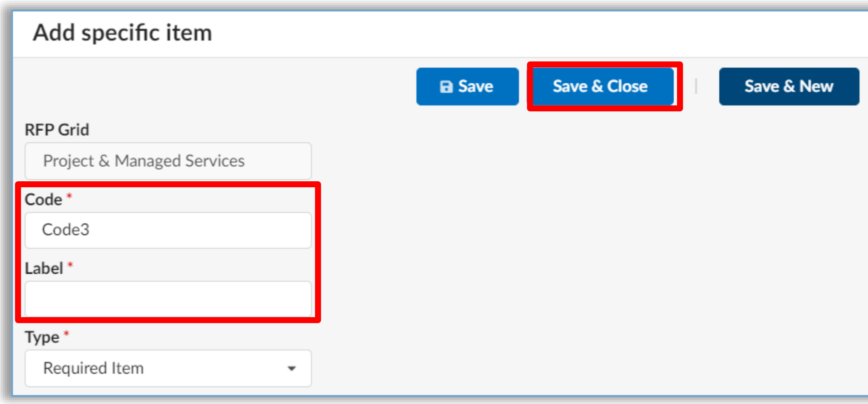
Depending on the solicitation, you are able to submit a response for an alternate (yet comparable) good/service or to add a line item for shipping/freight costs if needed. Please review the solicitation documents to see if the State will accept alternate items and if so, click the **Plus** icon in the answer grid.



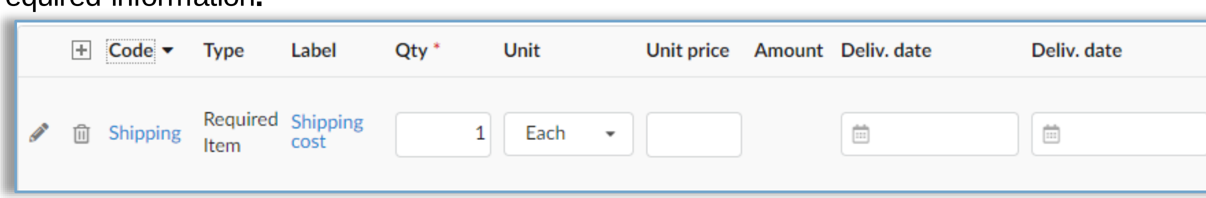
Complete the following fields:

1. **Code:** this automatically populates with a unique identifier for the item being added. Update this field to inform the State you are adding an alternate item or freight costs.
2. **Label:** Enter a detailed description of the item being added.

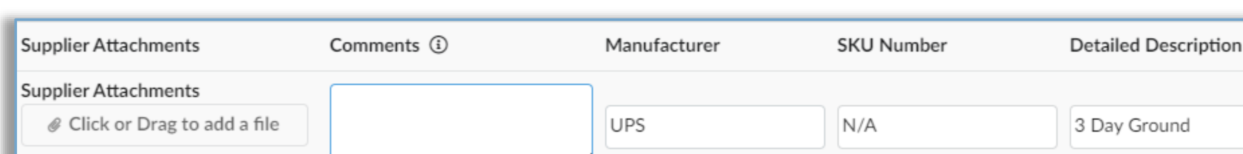


3. Click **Save & Close.**

Once you have added an alternate item or a line item for shipping/freight costs enter the required information**.**



⚠ Note that depending on your screen resolution you may need to scroll to the right to see these fields.



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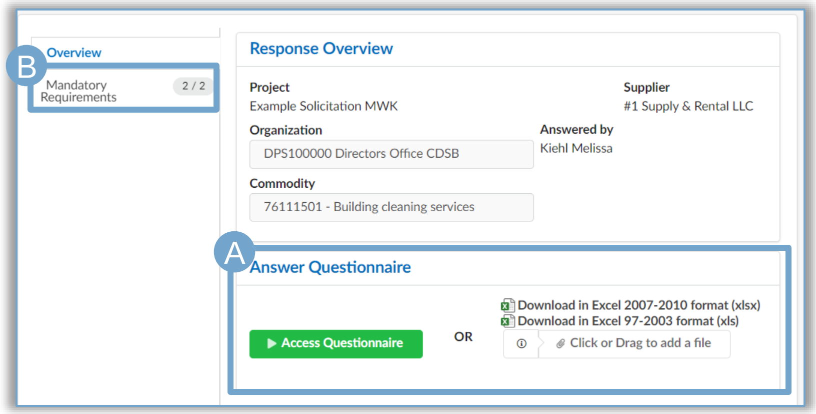
Mandatory/Financial/Technical Questionnaire tabs:

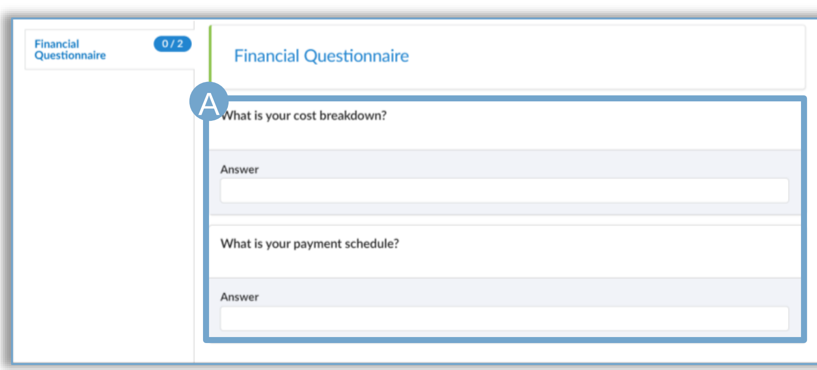


a) On the Overview section, users can download the displayed questionnaire into an Excel spreadsheet, fill in your responses in Excel, save the file, and upload the completed grid to OhioBuys. To do this:

   1. Click **Download in Excel 2007-2010 format (xlsx)**
   2. Open the corresponding Excel spreadsheet that was downloaded to your computer and follow the instructions contained in the spreadsheet.
   3. After you have completed the spreadsheet, save the file and then upload it into OhioBuys by clicking on the **Click or Drag to add a file** button on the corresponding tab you are trying to populate.

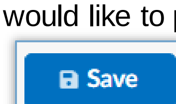
b) Each section of the questionnaire is displayed as a tab on the lefthand side. Click the section label to open it.

⚠ You are able to click the **Access Questionnaire** button to have OhioBuys navigate you to the first unanswered question.



a) Enter responses for each of the questions listed on these tabs. The answers you enter on this tab will be saved as they are entered.

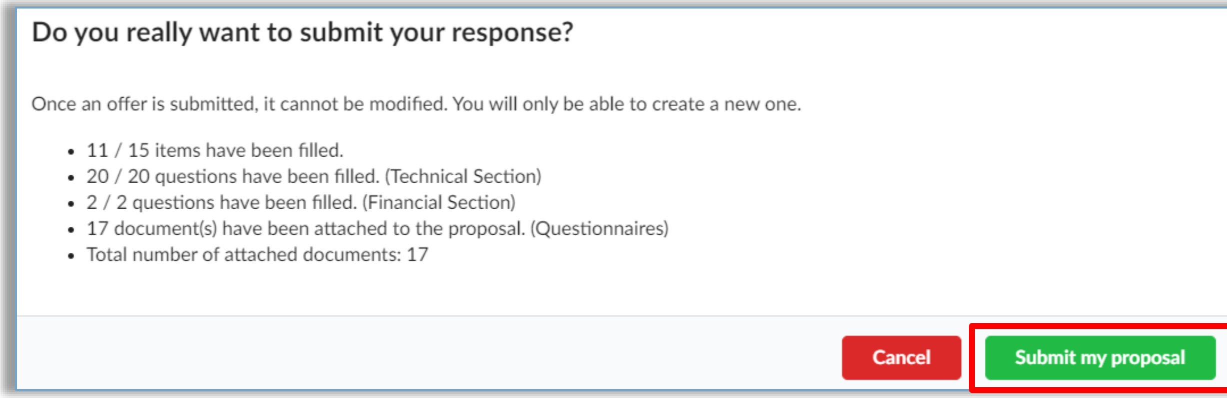
b) Once you are done with populating this tab or you would like to proceed with completing another tab, click **Save.**



Step-by-Step Instructions for Submitting a Response to a Solicitation

13 Once you have entered all of the necessary information, click **Validate & Submit Proposal.**

14 Click **Submit my Proposal.**

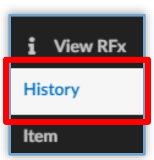


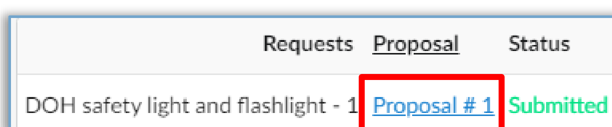
⚠ After your response has been submitted, you will receive email notifications regarding any updates for the solicitation.

⚠ If the State issues an amendment (i.e., a new round), you will be required to acknowledge receipt of the amendment and re-submit a response to remain under solicitation consideration. Please refer to the Amending and/or Withdrawing a Response section of this learner guide for details on how to copy a previous response and submit a revised response as part of an amendment..

⚠ To view previously submitted responses, navigate to the **History** tab of the solicitation. After submitting a response, users should check the **History** tab and confirm that their proposal has a status of **Submitted**.

A summary of your previously submitted responses for the solicitation are displayed. To view the full details of a response click the associated **Proposal hyperlink**.





If you would like to submit an additional response, click **Create a new proposal** and then follow the instructions detailed in Steps 8 - 13.

Step-by-Step Instructions for Submitting a Response to a Solicitation

If the State requires additional clarifications, they may ask you to submit them without creating a new lot or round. In this scenario, the user who submitted the response to the State will receive an email notification.

This email will contain both details on the reason that additional clarifications are required, and the date by which clarifications should be submitted.

The previously submitted proposal will be reopened, and users will have the ability to modify any element of their response. Once the necessary updates have been made, users can resubmit their response following the steps outlined in the previous section of this guide.

This scenario is different from being invited to participate in an additional lot. When submitting an additional lot, users will be submitting a fresh response. (i.e., the information submitted in the previous lot will not be pre-populated in the new lot) When a previous proposal is reopened, users will have all of the information previously submitted in that proposal pre-populated before they resubmit.

AMENDING AND/OR WITHDRAWING A RESPONSE

Overview

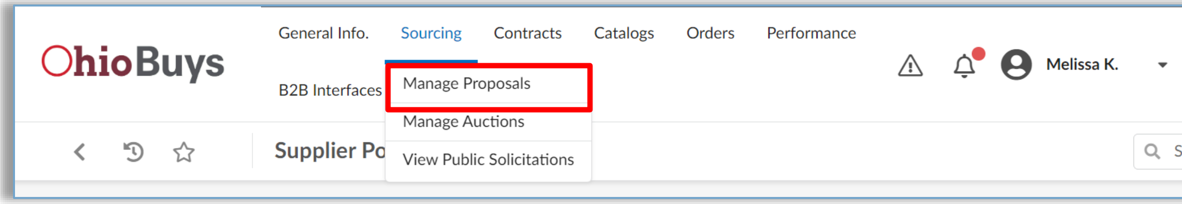
- What's Covered: Amending and/or withdrawing previously submitted response
- Roles: Bidders and/or Suppliers
- Used When: A Bidder or Supplier would like to amend a previously submitted response as part of a solicitation amendment or withdraw a response from consideration

OhioBuys How to Amend and/or Withdraw a Response

Step-by-Step Instructions for Amending and/or Withdrawing a Response

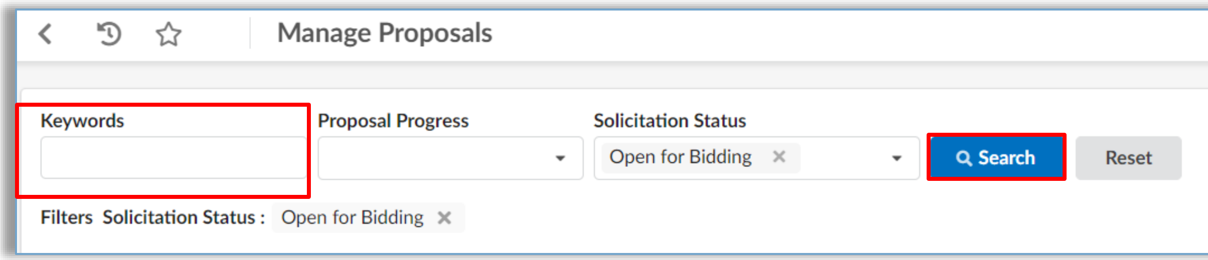
1

Log in to OhioBuys. From the Main Menu Navigation Bar, click **Sourcing** and then select **Manage Proposals** from the drop-down menu.



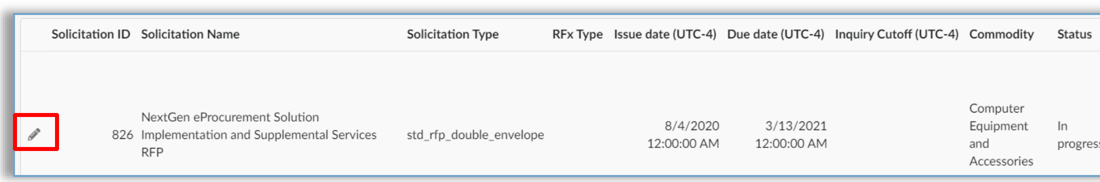
2

The Manage Proposals page is displayed. On this page, you can enter a variety of search terms to search for solicitations. Enter search terms in the **Keywords** search field and then click **Search.**



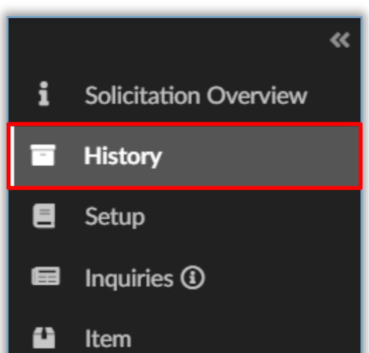
3

Search results are displayed below. Once you have found the solicitation you would like to review, click the **Pencil (✎)** icon next to the solicitation name.



4

Navigate to the **History** tab.

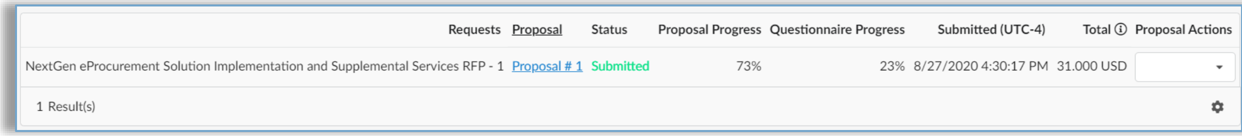


OhioBuys How to Amend and/or Withdraw a Response

Step-by-Step Instructions for Amending and/or Withdrawing a Response

5

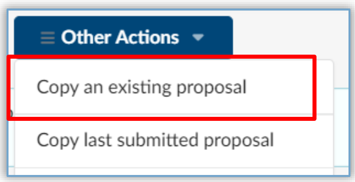
A summary of your previously submitted responses for the solicitation are displayed. To view the full details of a response click the associated **Proposal hyperlink**.



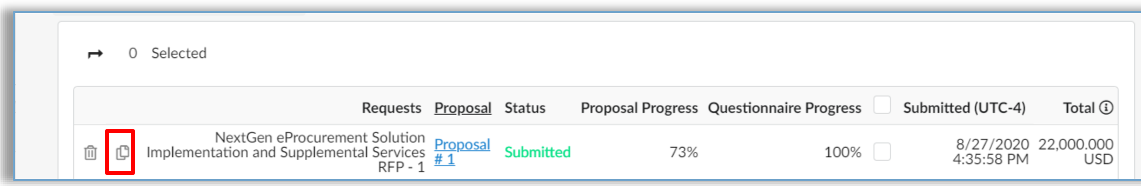
6

Copying a Response: If the State issues an amendment (i.e., a new round), you will be required to acknowledge receipt of the amendment and re-submit a response to remain under solicitation consideration. To begin the process of submitting a response for an amendment, we recommend using the copy functionality if you have already submitted a response to an earlier round of the solicitation.

a. Select **Copy an Existing Proposal** from the **Other Actions** drop-down menu.



b. Click the **Copy an existing proposal ( )** icon next to the proposal you want to copy.

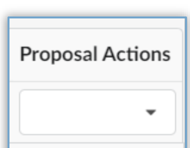


c. Click **OK.** The selected response has been copied into a new draft response. Make the desired updates and submit the revised response.

7

Withdrawing a Response:

a. From the **History** tab of a solicitation, select **Withdraw** from the **Proposal Actions** drop-down menu for the response you would like to withdraw.



b. Click **Save.**

c. The submitted response has been withdrawn from consideration. If you have submitted multiple responses for a solicitation, you will need to individually withdraw each response if you want all of the responses to be withdrawn. Lastly, all response withdrawals need to occur prior to the Bid Due Date for a solicitation.

Version Control

Version	Publish Date	Summary of Updates	Pages Updated
1.0	10/16/20	Initial draft	All
1.1	10/19/20	Updated page 4	3
1.2	11/05/20	Added additional inquiry details	8, 10
1.3	12/23/20	Added details regarding UTC time	6, 12
1.4	2/29/21	Update Public Solicitation screenshots	6, 8, 12
1.5	3/31/21	Updated UTC to ETC, Bolded Copying a Response text	6, 8, 12, 21
1.6	5/12/21	Removed limitations on projects inquiries can eb submitted for	3
1.7	7/1/21	Added proper OBM email address	2
1.8	9/10/21	Added a callout page that emphasizes that all solicitation responses should be submitted from a Supplier's head office	12
1.9	9/20/21	Updated Supplier URL	6
2.0	10/8/21	Updated OhioBuys logo	Entire Document
2.1	12/22/21	Removed text around acknowledging an RFP, added details on indicating a business will response. Clarified inquiry process	9, 10, 13, 14

Version Control

Version	Publish Date	Summary of Updates	Pages Updated
2.2	5/19/2022	Added instructions to confirm the proposal was Submitted	19
2.3	6/28/2022	Reordered the list of tabs and added updated screenshot	6
2.4	7/8/2022	New screenshot for item grid, and added notes on mandatory field and in-line response.	16
2.5	8/30/2022	Hid the ability for Suppliers to add an attachment when submitting an Inquiry.	10
2.6	01/17/23	Added a note regarding multiple OhioBuys windows and errors that can come as a result	12
3.0	05/09/2023	Updated to include 2023 OhioBuys Upgrade funcitonality	All